

## SCHEDULE NO. 6

### FLEET AND EQUIPMENT RECORDS

General Description: Records documenting the acquisition and operation of municipally owned or leased vehicles and equipment.

The **MINIMUM** retention periods specified in this schedule apply to the information contained within the record, **regardless of the physical format of the record (paper, microfilm, computer disk or tape, optical disk, etc.)**. **Duplicate Copies:** Provided that no retention period is specified for duplicate copies, retain those that are created for **administrative purposes** for 1 year, and retain those created for **convenience or reference purposes** until no longer needed or for 1 year, whichever is first. Duplicate copies should not be retained longer than the record copy.

#### 6.10 AGREEMENTS – ACQUISITION, LEASE, MAINTENANCE AND SERVICE

See 7.20, *Agreements and Contracts*.

#### 6.20 AUCTION RECORDS

See 5.180.C, *Auction Records*.

#### 6.30 BILLS OF SALE

Bills of sale documenting acquisition or disposition of vehicles or equipment by the municipality.

Retention: Until after audit of records pertaining to disposition of vehicle or equipment

#### 6.40 COMMUNICATIONS SYSTEM LICENSES

See 9-5.10, *Communication Systems Records*. **<Amended 3/10>**

#### 6.50 COMPUTER SYSTEM RECORDS

See 9-5.20, *Computer System Records*. **<Amended 3/10>**

#### 6.60 EQUIPMENT RECORDS

Records pertaining to major mechanical systems in municipally owned facilities, including fire and water detection alarm systems; heating, ventilation, air conditioning (HVAC) and similar mechanical systems; disaster warning systems; elevators; sump pumps; power generators; boilers; etc. See also 6.160, *Telephone System – Municipal Buildings*. **<Amended 4/06>**

Retention: Life of equipment + 1 year

#### 6.70 FUEL RECORDS

Records pertaining to fuel usage by municipal vehicles and equipment, including periodic fuel usage reports.

Retention: 2 years

#### 6.80 INSURANCE COVERAGE

See 5.240.E, *Insurance Policies*.

#### 6.90 INVENTORIES – FLEET AND EQUIPMENT

Listings of vehicles, equipment and similar property owned by the municipality. See also 5.180.G, *Inventories*.

Retention: Until revised

**6.100 LEASE-PURCHASE RECORDS**

See 5.300.F, *Lease-Purchase Records*.

**6.110 MAINTENANCE AND SAFETY RECORDS**

**A. Driver Vehicle Inspection Reports**

Vehicle inspection reports and documentation of corrective actions taken by motor carriers or their agents with regard to defects or deficiencies noted during the inspection prior to operation of a motor vehicle. Note: A legible copy of the last vehicle inspection report is to be carried in the vehicle. See also 6.180, *Vehicle Histories*.

Retention: 3 months [49 CFR 396.11 and 49 396.13]

**B. Inspection and Maintenance Documentation – Vehicles and Equipment** <Amended 3/07>

Records and reports pertaining to maintenance and inspections performed for municipal vehicles and equipment, including those records required by State and federal regulations. <Amended 3/07>

Retention: Until vehicle or equipment is no longer under municipal control + 1 year <Amended 3/07>

**C. Work Orders**

See 6.220, *Work Orders*.

**6.120 MANUALS – VEHICLES AND EQUIPMENT**

Manuals provided by the vendor regarding specifications and proper installation, operation and maintenance of vehicles or equipment.

Retention: Life of unit + 1 year

**6.130 OFFICE EQUIPMENT RECORDS**

Records pertaining to the acquisition, installation and operation of office equipment used by the municipality. See also 9-5.20, *Computer System Records*. <Amended 3/10>

Retention: Life of equipment + 1 year

**6.140 POLICIES AND PROCEDURES**

See 7.260, *Policies and Procedures Documentation*.

**6.150 PURCHASING RECORDS**

See 5.300, *Purchasing Records*.

**6.160 TELEPHONE SYSTEM – MUNICIPAL BUILDINGS**

See 9-5.10, *Communication Systems Records*. <Amended 3/10>

**6.170 UNCLAIMED PERSONAL PROPERTY**

See 5.180.E, *Disposition Records*.

**6.180 VEHICLE HISTORIES**

Records outlining the acquisition and maintenance history of a vehicle, often stored in the vehicle. See also 6.110, *Maintenance and Safety Records*.

Retention: Life of vehicle + 1 year

**6.190 VEHICLE REGISTRATION CERTIFICATES**

Documentation issued by the County motor vehicle department providing information regarding vehicle licensing and ownership, ownership taxes paid and vehicle identification number.

Retention: Until superseded or disposition of vehicle

**6.200 VEHICLE TITLES**

Title proving ownership of motor vehicles owned by the municipality.

Retention: Transfer to new owner upon disposition of vehicle

**6.210 WARRANTIES**

Records of manufacturer's warranties and guarantees relating to operation or replacement of vehicles, equipment or components.

Retention: Life of equipment or expiration of warranty + 1 year, whichever is later

**6.220 WORK ORDERS**

Documentation of requests and authorizations for work performed with regard to vehicles and equipment. See also 6.180, *Vehicle Histories*. **<Amended 2/08>**

Retention: 1 year + current unless the work order provides the only available vehicle history, in which case it should be retained for the life of the vehicle or equipment + 1 year **<Amended 2/08>**